

Mining and Rock Excavation Technique



Atlas Copco Capital Markets Day, November 15, 2012
Bob Fassl, Business Area President

Sustainable Productivity

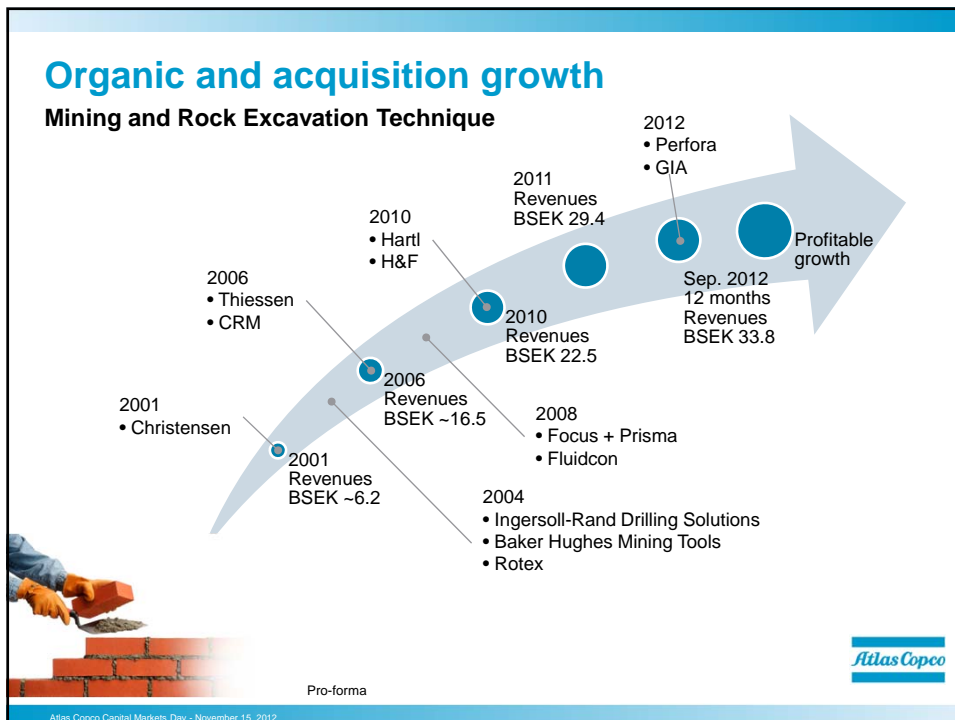


Safety First!



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More than 100 years experience



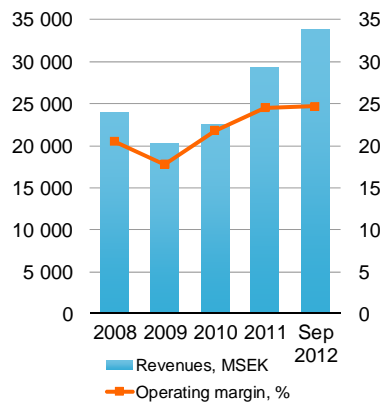
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Mining and Rock Excavation Technique

Today

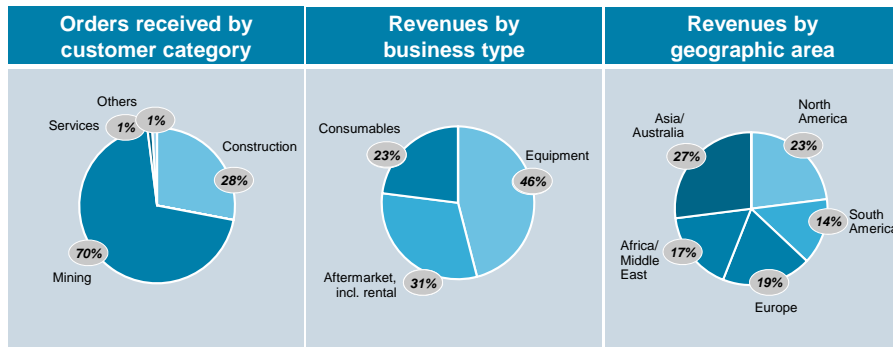
- Strong global market position
- Large aftermarket and consumables business
- A significant local presence in high growth emerging markets
- Customers rate Atlas Copco very high on product performance and reliability
- Stable and flexible organization and a strong management pool



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Mining and Rock Excavation Technique



YTD September 2012

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Capitalize on major trends



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Mining

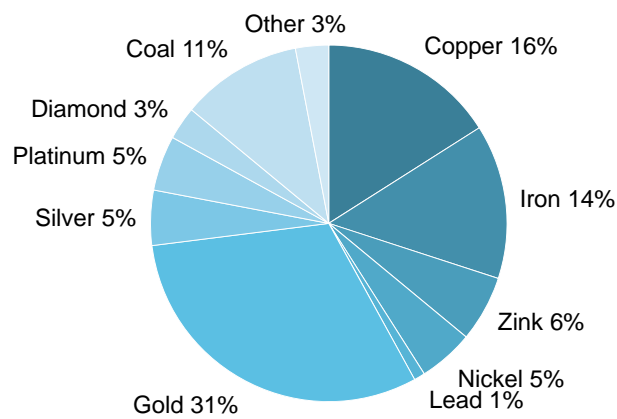


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Mining

Estimated exposure to minerals



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Outlook / trends

Mining

- Continued demand for minerals long term
 - Somewhat weaker short term
- Total cost of ownership and optimization of full value chain
 - Increased mechanization and more automation
 - Equipment availability
 - Energy and safety
- More underground, lower ore grades and remote locations
- Consolidation



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Mechanical Rock Excavation

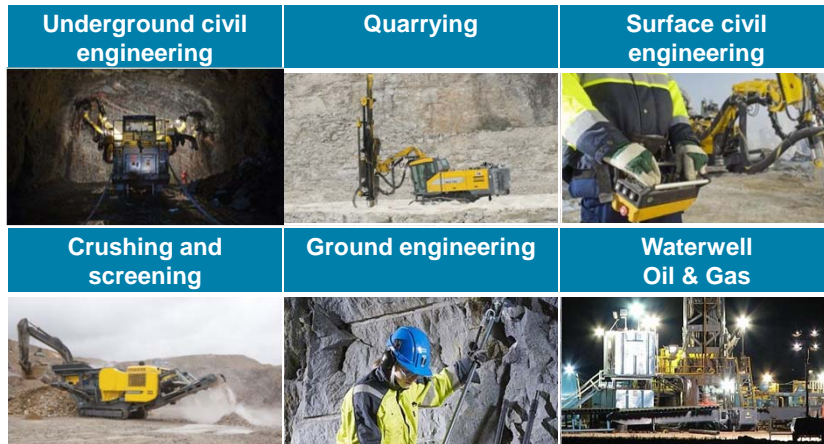


David Shellhammer
Division President, Underground Rock Excavation

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Civil engineering / construction



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Outlook / trends

Civil engineering / Infrastructure

- Investments in infrastructure
 - Tunneling
 - Hydropower plants
 - Road development
 - Geotechnical work



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Priorities

Innovation / Product development 	Aftermarket 	Presence 
Operational excellence 	Acquisitions 	People management 



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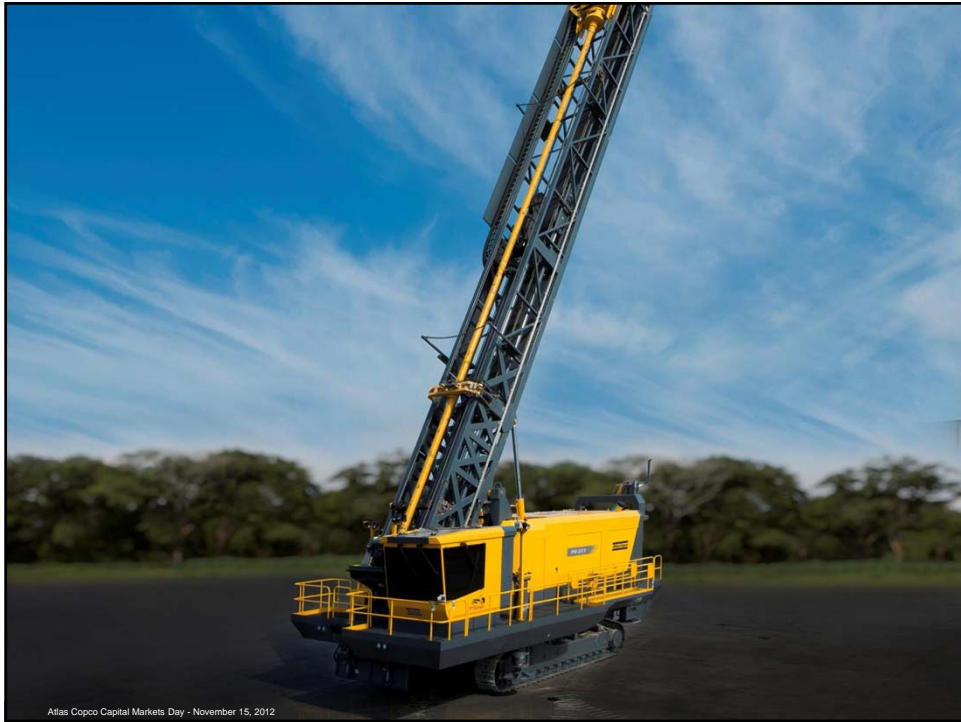
Automation



Peter Salditt
Division President, Drilling Solutions

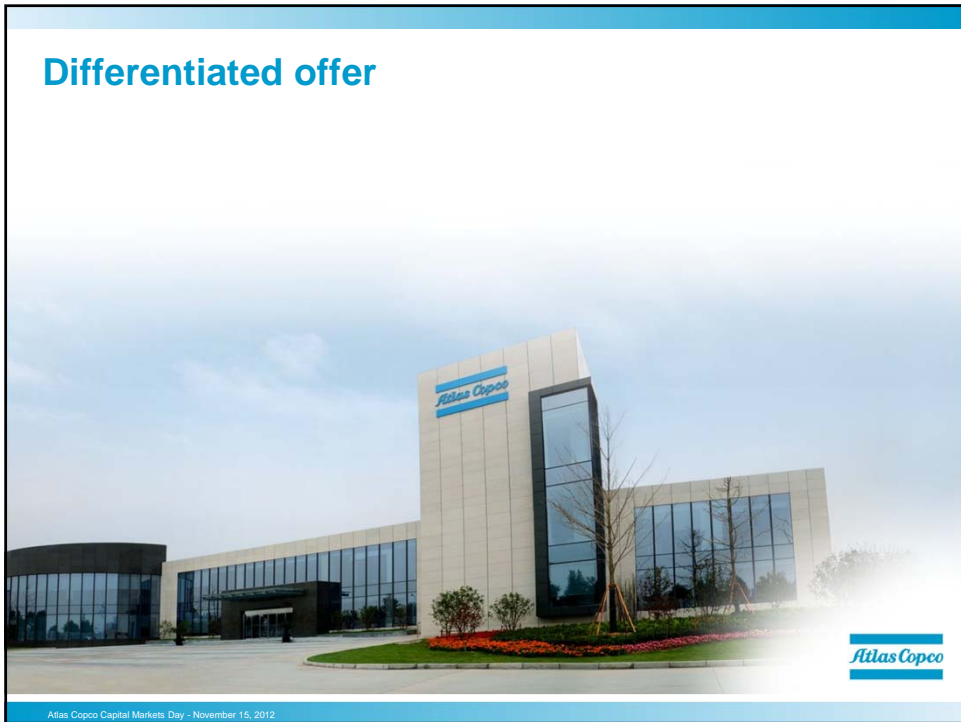
Sustainable Productivity







Differentiated offer



Meeting the demands for surface drilling in China



Markku Teräsvasara
Division President, Surface Drilling

Sustainable Productivity



Atlas Copco Service



Andreas Malmberg
Division President, Mining and Rock Excavation Service

Sustainable Productivity



Adding value through drilling consumables contracts

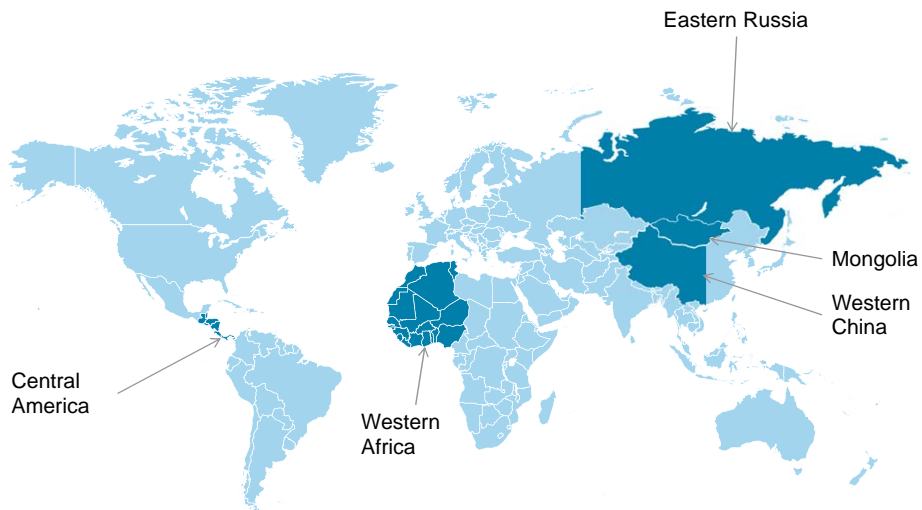


Johan Halling
Division President, Rock Drilling Tools

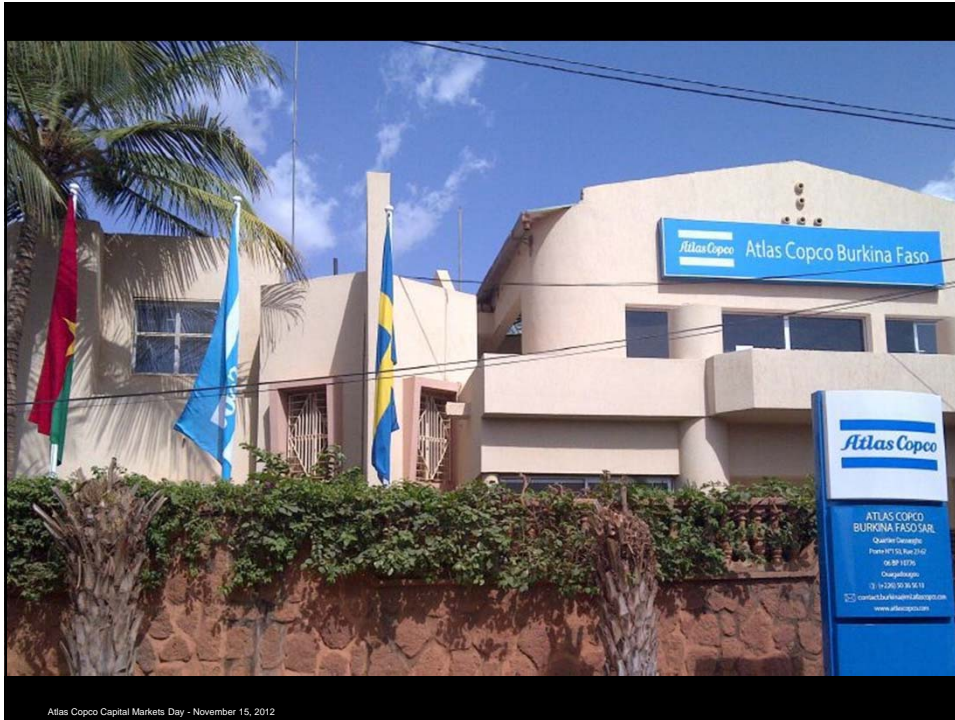
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Examples of new presence



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Operational excellence

- Increase equipment availability through excellent service
- Reduce lead time in manufacturing
- Working capital efficiency



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Acquisitions

- Extending the offer
- Increase presence and penetration in the market



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Dimensional stone industry

Acquisition of Perfora



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Utility vehicles

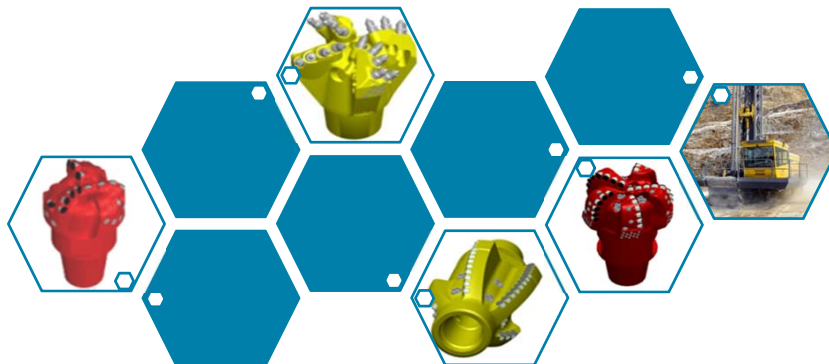
Acquisition of GIA



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Drill bits

Acquisition of Newtech



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**Committed to
sustainable productivity.**



